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ABSTRACT

The educational needs of elderly people (those over 60 years) around the world are examined in this paper. First, brief attention is given to the changing demographic structure in various regions of the world, and emphasis is placed on the dramatic increases in the proportion of elderly in the world's population. Particular references are made to recent changes in the age structure of Australia and New Zealand. The educational needs of the elderly, and ways in which they are being met, are described in terms of the differing theories of R. J. Havighurst and H. Y. McCluskey. Policies and provisions in practice throughout the world are discussed next, including: legislatively supported education programs for the elderly; the elder hostel system in United States universities; the European "universities du troisieme age" (universities of the third age); the United Kingdom's Forum for the Rights of the Elderly Persons to Education; Chinese organizations which support lifelong learning; and the Wider Horizons program of New Zealand. A brief concluding section predicts that the educational concerns of the elderly will increasingly be given prominence over the coming decades, especially as the elderly themselves seek to assert their rights and access to education. (KH)

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EDUCATIONAL GERONTOLOGY: AN INTERNATIONAL PERSPECTIVE

by

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EDUCATIONAL GERONTOLOGY: AN INTERNATIONAL PERSPECTIVE

DAVID BATTERSBY

INTRODUCTION

In the first part of this paper, brief attention will be given to the changing demographic structure in various regions of the world, and in particular the dramatic increases in the proportion of the over-60's in the world's population will be highlighted. By way of illustration, reference will be made to changes in the age structure of Australia and New Zealand in recent years. Against this background, the second part of the paper will focus briefly on the educational needs of the elderly (those over 60 years) and this will be followed by a discussion of the educational provisions and policies for the elderly. Here, discussion will focus inter alia on legislative support for educational programmes for the elderly, the elder hostel system in the United States universities du troisième age in Europe and the Wider Horizons programme in New Zealand. The paper will conclude with a prediction that the elderly will increasingly become less satisfied with nature trips, bingo and arty-crafty activities and will seek, and most likely demand, those rights to education that most of us have taken for granted.

DEMOGRAPHIC TRENDS

The impact of aging, or as Dobman¹ has phrased it, 'the greying of nations', has been dramatic during this century. At the turn of the century a life expectancy of about 50 years was common in most industrial countries, while today 70 years is about the normal life span in western industrialised countries. Taking Australia as an example, the extent of this change is shown in the Table 1 which provides details obtained from each Australian census from 1901 to 1976 of persons aged 65 and over as a percentage of the total population. It can be seen from this table that in Australia the proportion of elderly people in the population increased quite dramatically during the first six decades of this century and that in recent times the percentage has remained relatively constant. A similar trend has also occurred in New Zealand, as Hyslop reports:

The proportion of people aged 60 years and over in New Zealand's population had doubled since the turn of the century - from under 7 percent in 1901 to just over 14 percent in 1981. One in seven New Zealanders is now aged over 60.³

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TABLE 1
Census Data on Aging in Australia²

% of	1901	1911	1921	1931	1947	1954	1961	1966	1971	1976
Females 65 & Over to total females	3.61	4.20	4.38	6.59	8.67	9.25	9.82	10.01	9.75	10.03
Males 65 & Over to total males	4.31	4.34	4.48	6.38	7.37	7.37	7.23	7.09	6.97	7.04
Persons 65 & Over to total persons	3.98	4.27	4.43	6.48	8.05	8.30	8.51	8.54	8.35	8.09
Persons 65 & Over to total workforce	9.29	9.91	10.76	15.66	19.09	20.15	21.17	20.31	19.98	19.09
Persons 65 & Over to persons 15-64	5.59	6.72	6.92	9.31	12.03	12.14	13.89	13.75	13.40	13.80

Besides Australia and New Zealand, other countries have experienced increases in the proportion of elderly people in their population. A recently published UNESCO report highlights this:

Among the most remarkable developments...are those which have taken place in the Eastern European Countries, where the number of elderly people has increased dramatically over the last 15-20 years. For example, between 1960 and 1976, the number of persons aged 60 and above rose by 600,000 (61 percent) in Bulgaria and by 500,000 (37 percent) in Hungary; in Poland there was a twofold increase in this group and in Romania a threefold increase.⁴

Even more dramatic, however, are the predictions for future changes in the proportion of elderly people in society. Gehmacher provides an insight here:

Between 1970 and the year 2000, France is expected to have a 29 percent increase in its population of over 65 and 42 percent increase for those over 80, and 122 percent increase for its population over 85... In the United States from 1975 to 2000 the 55-64 age group will increase by 16 percent, the 65-74 group by 23 percent and those over 75 years and above will increase by 60 percent.⁵

A further illustration of the trends to which Gehmacher refers can be seen in the following table which gives the percentage of the New Zealand population designated as elderly for 1951-1981 and the projected estimates for 1991-2001.

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TABLE 2

Elderly Parsons Aged 60 and Over: 1951-2001

	1951	1961	1971	1981	1991	2001
Men	122,734	133,045	159,446	195,830	205,700	241,440
Women	133,236	161,859	198,578	251,790	286,200	298,950
Total	255,970	294,904	358,024	447,620	491,900	540,390
% of pop	13.2	12.2	12.5	14.1	14.3	14.9

On a worldwide basis, demographic data suggest that while the total population is expected to treble between 1950 and 2025, there is predicted to be a fivefold increase in the over-60's age group. The following table gives a breakdown in the expected increases in the proportion of over-60's in the world's population between the years 1975-2025:

TABLE 3

The Over-60's: 1975-2025

Region	% pop over 60 in 1975	% pop over 60 in 2025
North America	14.6%	22.3%
Latin America	6.3%	10.8%
Europe	17.4%	24.7%
USSR	13.4%	20.1%
Africa	4.9%	6.6%
East Asia	8.2%	19.6%
South Asia	5.0%	10.9%
Oceania	11.1%	17.8%

It appears that two well-established trends are responsible for this change in the population structure: decline in birth rates and an increase in life expectancy. The United Nations Population Division reports that worldwide birth rates are expected to be cut by half between 1950 and 2025 and that the average life expectancy is predicted to rise from 47 to 70 years. Indeed, it seems that the centuries old trend of the very young outnumbering the old (e.g. in 1950 there were nearly two under fives for every one person over 60) will not be overturned and that by 2025 those over 60 years will outnumber those under five years of age by two to one.

The above data, then, provides a cursory insight into both worldwide and Australasian trends relating to the proportion of elderly in society. While the economic and social effects of these trends have captured some attention (see, for example, Howe⁸ and Dobman⁹), the educational implications of an aging population have received little consideration. In the next section of this paper, brief mention will be made of the educational needs of the elderly and this will be followed by several examples of how some of these needs are being met.

THE ELDERLY AND EDUCATION

Probably the two most prominent theorists to speculate about the educational needs of the elderly have been Havighurst¹⁰ and McClusky¹¹.

According to Havighurst, a person's life cycle is comprised of a series of dominant concerns, each of which governs the behaviour of a person. Three of the eight dominant concerns identified by Havighurst relate directly to the elderly. The first of these, maintaining position and changing roles (Age 50-60) is described by Havighurst in the following way:

By this age the situation of the individual is definitely losing its earlier advantages. Starting with a decline of physical strength and skill and attractiveness in the early 50's the body becomes less and less favourable for the operation of ego.¹²

This is a plateau period for most people in terms of their power, influence and productivity. Also, during this decade, men and women are likely to assume roles as grandparents and may consequently recognise that the future seems a short period of time in which there may not be time to do everything planned for in earlier decades. Accordingly, to Havighurst, the secret of competence during the 50 to 60 age period seems to lie in the changing of one's roles to take advantage of increased experience as well as to avoid the disadvantages that may accrue from decreased physical vigor and attractiveness. As to the implications for education, Havighurst is less sure:

Adult education has yet to discover its mission for people in their 50's. In addition to providing for the self-initiating learners, probably it should search for ways of helping people to get perspective on themselves and their careers, and to make the role changes that lead to increased effectiveness and happiness.¹³

The next stage in Havighurst's life cycle conceptualisation is the 60-70 age group - deciding whether to disengage and how. During this decade, men and women in the workforce generally lose their job, through either

mandatory or arbitrary retirement schemes and one partner in the marriage, usually the man, dies by the age of 70. The crisis for this age group is that of disengagement which Havighurst describes as a process of decreasing interaction between the person and society. A great many people seem to resist disengagement:

A person refuses to retire from employment and seeks other jobs when s/he is automatically retired from his/her main career job. A person holds onto offices in church or clubs, in spite of gentle hints that it is time to make way for younger people.¹⁴

Havighurst maintains that after the age of 70 everybody disengages rapidly, and that those who disengage least rapidly are, happier than those who disengage rapidly. What are the implications here for education and the elderly? One possibility, says Havighurst, is to set up study groups on the process of disengagement for those people in their late 50's and early 60's. As well:

There are other education activities which are attractive to people at this age... These include: classes and study groups in international relations, domestic economic and political problems; cultural activities dealing with music, art, dramatics; and the social activities of churches, clubs and other associations.¹⁵

The final years of one's life beyond the age of 70 are concerned with making the most of disengagement. During this stage, the elderly generally look on family and friends as the link to the social world, and much time and energy is expended on home and personal life. Moreover, Havighurst is of the opinion that marked differences between the sexes emerge in this period. Men, for instance, seem to become more introverted than women and tend to relinquish leadership roles more fully than women. In setting-up educational programmes for this age group, says Havighurst, one comes across two opposing theories - the stay young, keep active theory and the rocking-chair theory. He expands further:

The proponent of the rocking-chair theory would say that a program to enhance life satisfaction should concentrate on making the social situation as comfortable as possible... The proponent of the stay young, keep active theory would favour a program of group activities...classes in painting, travel in groups and opportunity for informal social activities.¹⁶

These final three life cycle stages which have been identified by Havighurst provide a useful insight into the dominant concerns of the elderly and how some of these concerns may be met by educational programmes. The other theorist referred to earlier, McClusky, also

speculates about the needs of the elderly when he suggests they have coping, expressive, contributive and influence needs.

McClusky maintained that coping needs are met by such programmes as adult basic education, health education, training for economic improvement, legal arrangements, family adjustments and use of leisure time. This group of needs must be met, says McClusky, in order for the elderly to continue adequate social adjustment, psychological health and physical well-being.

Expressive needs according to McClusky, refer to those activities the elderly engage in which have intrinsic meaning and pleasure. This may include physical education, liberal and general educational studies and hobbies. Contributive needs, on the other hand, are those which encourage the aged to assist others in society through voluntary organisations and can be met by leadership and various community education programmes. And influence needs reflect the desire of the elderly to play a part in the direction and quality of their lives. Here again, McClusky suggests leadership and community education activities, as well as programmes related to political awareness.

Taken together, both Havighurst's and McClusky's work provides a fairly comprehensive identification of the educational concerns and needs of the elderly. Indeed, as the discussion below illustrates, when reference is made to existing educational programmes for the elderly, it is sometimes possible to use Havighurst's and McClusky's 'needs categories' to classify the type of programme being offered.

EDUCATIONAL PROVISIONS AND POLICIES FOR THE ELDERLY UNITED STATES

Interest in and concern for increasing the learning opportunities for older adults in the United States contributed to the passage of the Lifelong Learning Act and the Senior Citizen Higher Education Opportunity Act during the 1970's. Both of these Acts provide legislative support for educational programmes for the elderly and currently one university out of three is offering provision, in the form of special courses and tuition waivers, for the elderly. As well, various bodies, such as centres for senior citizens, community schools, and associations of elderly persons, organise educational activities for the aged.

A recent innovation in the United States has been the establishment of an elderhostel system which has a number of participating universities and colleges that offer summer residential programmes for the elderly.

A feature of the elderhostel is that it provides a variety of short courses (e.g. liberal arts, science, psychology) that involve no grades or examination and it places emphasis on combining leisure activities with an educational experience.

EUROPE

A variety of educational programmes and experiences are provided for the elderly in both eastern and western Europe. In Austria, for example, specific training programmes (in modern mathematics, foreign languages, etc) are offered to grandparents to enable them to provide more effective help to grandchildren in whose education they are encouraged to participate. As well, all Austrian universities organise special courses for the elderly, and over 600 aged persons attend Vienna University alone.

In France, Spain, Belgium, Portugal, Switzerland and Poland universities du troisième âge (universities of the third age) have been established to extend the cultural horizons of the elderly, to update and enrich their knowledge, to promote and develop human contacts and to encourage participation in community life. In France, there are nearly 60 of these institutions, each of which is affiliated with a university. It has been reported by Nusberg¹⁷ that demand for admission to these universities du troisième âge, throughout Europe, often exceeds the number of available spaces.

Sweden has approximately one-third of its adult population involved in continuing or adult education programmes all of which are financed from public funds. For the elderly, radio and television educational programmes, correspondence courses and consumer training courses have been specifically set up.

In eastern Europe, the Veterans of Labour University in the German Democratic Republic and the Scientific Education Society in Hungary have developed courses and activities for the elderly in preparation for their retirement, as well as programmes of education in health and hygiene.

UNITED KINGDOM

While the United Kingdom has a long tradition of adult education, there are only a very small number of programmes designed and organised for the elderly. Nevertheless, the Forum for the Rights of the Elderly Persons to Education has stimulated awareness of the rights and needs of the elderly in respect of education in both the formal and informal context.

CHINA

The idea of lifelong education is not novel in China and associations of veterans and retired workers have been formed for this purpose. Other specialised organisations, such as the Physical Education Association for Aging, also conduct educational programmes in which the study of such diverse subjects as poetry, philosophy, Chinese boxing, traditional therapeutic practices and the prevention and treatment of illness, is undertaken by the elderly.

NEW ZEALAND

Studies and statistics relating to the participation of the elderly in educational programmes in New Zealand are virtually non-existent and information that is available tends to suggest that less than one percent of the 440,000 elderly people in New Zealand is involved in formal education programmes and that between one and five percent of people engaged in continuing education programmes are 60 years of age or older.

Although the level of participation of the elderly in formal educational programmes is small, there are few barriers restricting their entry. For instance, each of the six universities in New Zealand has a provisional admission clause allowing entry to people such as the elderly, who may not meet formal admission requirements.

However, it is the less formal continuing education programmes which seem more attractive to the elderly in New Zealand. The types of programmes in which they become involved, along with people from other age groups, range in duration from one-day seminars to full year courses and span such areas as humanities and religion, fine and applied arts, natural science, crafts, law, social and behavioural science and communication. This diversity of continuing education courses is matched only by the variety of organisations and community groups who sponsor and run these programmes. These range from the Women's Division of the New Zealand Federated Farmers, to various Government Departments, to the New Zealand Broadcasting Corporation and the Trades' Unions.

A more specific type of educational provision and one which has proved popular with the elderly in recent times have been the 'Wider Horizons' programmes which have been specifically designed by the elderly for the elderly. In Christchurch, for instance a Wider Horizons programme was sponsored by the WEA in conjunction with the University of Canterbury and the courses that were offered included current affairs, painting and popular science.

CONCLUDING COMMENTS

There seems little doubt that the educational needs and concerns of the elderly will increasingly be given prominence over the coming decades, more so, as the elderly themselves seek to assert their rights and access to education. In tandem with this trend, it is likely that the currency of popular notions, such as 'intellectual loss accompanies old age', 'the elderly are too old to learn', and 'education is for the young' will be further eroded. Given this situation and the international trends towards educational provision for the elderly identified in this paper, the task ahead for the field of educational gerontology is exciting and unique. It would be a pity, therefore, if this field is left undeveloped. If this is the case, the unfortunate irony might be that by the turn of the century most of us will inherit the legacy of our short-sightedness.

FOOTNOTES

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- 3 Hyslop, J. "An Aging Population", In Barker, R.A. et al (eds) Aging New Zealanders, Wellington, Government Printer, 1982, p. 21.
- 4 UNESCO Education and Aging, Paris, UNESCO, 1982, p. 7.
- 5 Gehmacher, E. Educational Questions Concerning the Elderly, Vienna, UNESCO, 1978, p. 5 and 6.
- 6 Hyslop, op.cit., p. 22.
- 7 Collated from United Nations Population Division Reports, (1981-1982), New York, United Nations.
- 8 Howe, op.cit.
- 9 Dobman, op.cit.
- 10 Havighurst, R.J. "Changing Status and Roles During the Adult Life Cycle: Significance for Adult Education". In Burns, H.L. (ed) Sociological Backgrounds of Adult Education, Syracuse, New York, Syracuse University, 1970.
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- 12 Havighurst, op.cit., p. 30.
- 13 Havighurst, op.cit., p. 32.

- 14 Havighurst, op.cit., p. 33.
- 15 Havighurst, op.cit., p. 35.
- 16 Havighurst, op.cit., p. 36.
- 17 Nusberg, C. "Educational Opportunities for the Elderly in Industrialized Countries Outside the United States", Educational Gerontology, 1982, 8 (4), p. 401.

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